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Sigma Pi Phi Fraternity
45th Biennial Grand Boulé
Minneapolis, Minnesota

July 28 to August 3, 2000

Report and Recommendations of the Strategic Planning Committee

The Strategic Plan 2000–2004
Sigma Pi Phi Fraternity

Committee Members

Members of the Strategic Planning Committee included representatives from each of the five regions of Sigma Pi Phi:

Thomas B. Shropshire, Grand Sire Archon-Elect, Xi, Pacific, Chairman

John L. Mason, Archon, Eta, Western, Vice Chairman

Manford Byrd, Jr., Grand Thesauristes, Beta, Central

Jack Burley, Archon, Rho, Northeast

Robert V. Franklin, Chairman, Boulé Foundation Trustee Board, Alpha Phi, Central

John E. Green, Archon, Alpha Theta, Western

Odell Horton, Archon, Delta, Southeast

Alexander H. Johnson, Archon, Gamma Mu, Pacific

Richard I. McKinney, Past Grand Sire Archon, Gamma, Northeast

Cornell L. Moore, Archon, Omicron, Central

Calvin O. Pressley, Grand Grammateus, Kappa, Southeast

Lewis E. Proffitt, Regional Sire Archon, Delta Epsilon, Northeast

James E. Sheffield, Archon, Alpha Beta, Southeast

Donald M. Stewart, Archon, Zeta, Northeast

Charles C. Teamer, Archon, Alpha Alpha, Southeast

Executive Summary

To help guide Sigma Pi Phi to its 100th anniversary in 2004, Grand Sire Archon Eddie N. Williams established a Strategic Planning Committee in the latter part of 1998. Grand Sire Archon-Elect Thomas B. Shropshire was selected as the Chairman of this important committee, and Dr. John L. Mason was selected as Vice Chairman. The charge to the Strategic Planning Committee was to develop a 5-year plan for the period 2000 to 2004 and to oversee the implementation of the plan.

To facilitate the work of the Strategic Planning Committee, Dr. Walter V. Collier of C&A Technologies, a research and management consulting firm in Alexandria, Virginia, was retained to conduct the research and to assist in the development of this 5-year strategic plan.1 The planning process and preparation of the plan were completed between February 1999 and January 2000. As a part of the process, a strategic planning survey of the membership was commissioned and carried out successfully. About one-third of the Sigma Pi Phi members completed and returned a survey questionnaire by June 30, 1999. Demographic results from the survey painted a picture of members who were in the upper age levels (60 and older), married, and educated. Most of the members were corporate executives, physicians, or educators, and their personal annual salary ranged from under $50,000 to over $500,000, with an average of $150,000. Almost 4 out of 10 were either retired or semi-retired. The other 6 out of 10 were still practicing their respective professions.

Overall, the members of Sigma Pi Phi have been a part of the Fraternity for an average of 10.1 years. They tend to participate in the meetings and affairs of their Subordinate Boule more than those of their Regional Boulé or the Grand Boulé. Furthermore, they tend to be better informed about the committees, activities, and future plans of the Subordinate Boulé than those of the Regional or Grand Boulé. Recognizing their limited knowledge, a majority of the members indicated a desire to receive more information about the affairs of the regional and national levels within the organization. They prefer that this information be channeled to them through *The Journal*, the *Boulé Newsletter*, or regular post office mail.

Generally, the members expressed satisfaction about the Fraternity's organization and the effectiveness of the various committees. But again, the element of uncertainty loomed large among the membership body about exactly what the individual committees do.

1. This document summarizes the Strategic Plan. For more detail on the underlying research, rationales for the goals, and proposed implementation steps, the full Strategic Plan document is available upon request from the national office.

Recommendations

In addition to improving the flow of communication about activities and policies on the national and regional levels of the Fraternity, a number of other recommendations for the strategic plan emerged from the survey data. These recommendations are specifically based on the perceptions, assessments, opinions, and visions of a majority of the survey respondents.

Recommendation One: First and foremost, Sigma Pi Phi should remain dedicated to its founding purpose, i.e., to provide opportunities for members to get to know the best of one another.

Recommendation Two: The Fraternity should assume a more vocal role in forming and advocating a public policy agenda that enhances the living conditions and development of disadvantaged African Americans. Towards this end, it was suggested that a "think tank" be established to monitor social and economic policies that potentially impact African Americans and to offer policy recommendations. This observation parallels the thinking that went into the creation of the Grand Boulé Public Policy Committee at the 44th Annual Grand Boulé in Seattle.

Recommendation Three: The Fraternity should expand its membership. While suggestions for the number of new members ranged from a few thousand to as many as ten thousand, the survey respondents did not agreed upon a maximum number of members.

Recommendation Four: To assure its continued existence, Sigma Pi Phi should actively attract younger men into the organization by making available to them opportunities to assume positions of responsibility on committees and in other areas of the organization. Also, the Fraternity should implement a more consistent mentoring program for new members.

Recommendation Five: Sigma Pi Phi should develop strategies for increasing community awareness of the Fraternity on the local, regional, and national levels. Recommendation Six: The Fraternity should collaborate with other organizations to issue public, nonpartisan statements about social issues and to provide technical and financial assistance to community advocacy and service programs.

Recommendation Seven: The Fraternity should increase its involvement in and support for social, educational, and economic assistance programs for black communities. Further, the Fraternity should place special emphasis on providing educational assistance and role model support for African American youth.

Recommendations *(Continued)*

Recommendation Eight: The Boulé Foundation should continue to provide student scholarships to African American youth, as well as to offer grant support for social action programs. Other suggestions for enhancing the Foundation included: raising money from individuals and corporations; advertising the existence and purpose of the Foundation to the black community; collaborating with other foundations; and inviting more members of the Fraternity to help in fundraising activities.

The Strategic Plan for 2000 to 2004

The above recommendations from the membership were used to form the goals, objectives, and strategies of the Grand Boulé's 2000-2004 Strategic Plan, which are set forth below.

Mission
The mission of the Grand Boulé is to maintain an organization for the purpose of binding men of like qualities into a close, sacred, fraternal union, that they may know the best of one another, and that each in this life may to his full ability aid the other, and by concerted action bring about those things that seem best for all that cannot be accomplished by individual effort.

Vision
The Boulé of the 21st century will continue to serve as the preeminent fraternity for African American men of achievement. The Boulé also will continue to aid the community by encouraging Archons to become better informed about and to take appropriate action on major public policy issues of concern to the community, and by supporting or providing social action programs that benefit disadvantaged African Americans.

Recommended Goals, Objectives, and Strategies

The Strategic Planning Committee established a set of six goals and accompanying objectives for the period of 2000 to 2004, which are presented below. Following each objective or problem area, the rationale is given to aid the reader in relating the objectives to the specific areas of concern to the organization.

GOAL 1: EXPAND THE FRATERNITY'S MEMBERSHIP THROUGH IMPROVED RECRUITMENT AND MEMBER RETENTION.

Objective 1a: By December 2004, increase the total number of active members by 50 percent, or 5,000 members, through induction and new Subordinate Boulés. Rationale: To reverse current trend of declining inductees.

Strategy 1a: Executive Committee will encourage Subordinate Boulés to be more intentional in recruiting new members by allowing Archons to invite two outside couples to social functions. The Regional Sire Archons will develop a strategic plan for increasing the number of new members. The Growth and Expansion Committee will monitor membership trends and offer recommendations to the Executive Committee to improve the recruitment process.

Objective 1b: Recruit new members from geographic areas where Subordinate Boulés do not currently exist. Rationale: To increase new members by increasing the number of Subordinate Boulés.

Strategy 1b: Regional Sire Archons will identify 10 Boulés between 2000 and 2002 and 10 between 2002 and 2004 in untapped areas. Regional Sire Archons will also recommend that new Subordinate Boulés be chartered in areas where existing Subordinate Boulés are growing large and expansion is desirable.

Objective 1c: By December 2004, each Subordinate will increase by 50 percent the current number of members under the age of 50. Rationale: To enhance the growth and expansion of the Boulé.

Strategy 1c: Sire Archons of Subordinate Boulés will encourage younger Archons to recruit younger prospects. Sire Archons will further encourage Archons to participate in all aspects of the Fraternity, including committee work and speaking engagements at universities and professional organizations that have significant numbers of men under the age of 50.

Recommended Goals, Objectives, and Strategies *(Continued)*

Objective 1d: Follow the standardized member recruitment and orientation procedure, and disseminate to all Subordinate Boulés by January 2001. Rationale: To correct the current situation of inconsistent procedures used by different Subordinates.

Strategy 1d: Subordinates will aggressively implement the recruitment procedures indicated in the Revised Rituals Manual.

Objective 1e: Improve process and form for membership data collection and the database of member demographics, talents, and skills. Rationale: To facilitate a more cost-effective method to transmit membership data from Subordinates to the National Office and to have better member profile data for use in selling ad space in *The Journal*, in seeking outside support for the Boulé Foundation, and for use in identifying the talents and skills of members for committee work and other activities.

Strategy 1e: Grand Grammateus will revise the current data collection form, and the Webmaster will incorporate the form on the Fraternity's Website for member completion and on-line transmission to the National Office for automatic inclusion in the database.

Objective 1f: Promote attendance of new members at the Grand Boulé and Regional Meetings. Rationale: To ensure that new members are properly acculturated into the Boulé and that they are made to feel welcomed by the Fraternity.

Strategy 1f: New members will be strongly encouraged during the first three years to attend at least one Grand Boulé. The Grand Sire Archon will send all new Archons a special letter inviting them to the Grand Boulé. The Grand Boulé will explore new ways to recognize new Archons and Archousai. Regional Sire Archons will also send letters to new members inviting them to Regional meetings and affairs.

GOAL 2: ENHANCE IMAGE OF SIGMA PI PHI FRATERNITY.

Objective 2a: Increase awareness of the Grand Boulé within all appropriate arenas. Rationale: To correct misinformation about the Boulé and to facilitate the Fraternity's public policy and social action initiatives.

Recommended Goals, Objectives, and Strategies *(Continued)*

Strategy 2a: Executive Committee will carefully define the specific audiences that the Boulé wishes to target and will consider retaining a public relations consultant or firm to develop strategies to increase public awareness.

GOAL 3: AID THE COMMUNITY.

Objective 3a: Examine public policy issues that affect African Americans and develop a public policy agenda. Rationale: To use the resources and influence of Archons to put in place policies that enhance the social, economic, and health conditions of the black community.

Strategy 3a: The Public Policy Committee will research public policy issues, inform Archons about the importance of these issues, produce monographs, and offer recommendations to the Executive Committee on actions Archons may take to influence the development and execution of public policies in a nonpartisan manner.

Objective 3b: Have a more integrated relationship between the national and subordinate Social Action Committees in assisting the black community. Collaborate with other national black organizations to fund or operate local programs aimed at improving the social and economic conditions of black communities. Rationale: To reach out and provide more assistance to the community in ways that are effective and have the greatest impact.

Strategy 3b: The Grand Social Action Committee commissioned a survey to ascertain what areas of community need can be effectively and efficiently addressed by the Boulé without duplicating the efforts of other black organizations. The survey also determined the nature and scope of current and planned social action initiatives within the Subordinate Boulés. Based on the study, the Grand Social Action Committee will devise a plan to establish national social action initiatives and to assist the Subordinates in enhancing their local social and economic programs for the community.

Recommended Goals, Objectives, and Strategies *(Continued)*

GOAL 4: IMPROVE ARCHON AWARENESS OF THE POLICIES, FUNCTIONS, AND ACTIVITIES OF THE GRAND AND REGIONAL BOULÉ.

Objective 4a: Include with the new member orientation materials an updated description of the Grand and Regional structures, functions, officer positions, committees, and purposes of the committees by December 31, 2000. Rationale: To promote better member understanding of the Boulé organization.

Strategy 4a: The Grand Grammateus will update and produce a booklet on the history, structure, and routine activities of the Fraternity. The booklet will be disseminated to the Subordinate Boulés. Contents of the booklet will also be posted on the Fraternity's Website.

Objective 4b: Keep all Archons informed about changes in policies, activities, and plans of the Grand, Regional, and Subordinate Boulés via *The Journal*, *Newsletter*, and secured pages of the Fraternity's Website. Rationale: To address the desire of Archons to become better informed about what goes on in the organization.

Strategy 4b: Greater use will be made of The Journal to keep Archons informed. The Chat Room on the Boulé's Website will also be used to disseminate information to Archons and to discuss topics of interest, such as the strategic plan, public policy, and world issues affecting the black community, as well as social action initiatives of the Subordinate Boulés.

Objective 4c: Improve information exchange among all Subordinate Boulés. Rationale: To improve awareness among Subordinate Boulés about the actions and activities of other Subordinates and to enhance intra-Fraternity relations.

Strategy 4c: The Grand Grapter will continue to emphasize the need for timely receipt of information from the Subordinate Boulés for inclusion in The Journal and the Website, e.g., local activity announcements, "best practices" of social action initiatives, successful methods of member recruitment, fundraising, and other items that will keep all Archons abreast of what is going on within the broader brotherhood of Sigma Pi Phi.

Recommended Goals, Objectives, and Strategies *(Continued)*

Strategy 4d: Regional Sire Archons will encourage Subordinate Boulés to conduct joint recreational and social affairs.

GOAL 5: ASSIST THE BOULÉ FOUNDATION TO ENHANCE ITS FINANCIAL BASE AND PROGRAMMATIC EFFECTIVENESS.

Objective 5a: By August 15, 2000, the Foundation will retain a fundraiser to develop a fundraising campaign. Rationale: To help the Foundation meet its fundraising goal and to establish an ongoing campaign to solicit internal and external donations.

Strategy 5a: The Foundation's Executive Committee will identify a fundraising firm. When retained, the Foundation Executive Committee will instruct the firm on its culture, practices, and needs, and oversee the development and implementation of the fundraising plan.

Objective 5b: By January 2004, increase the endowment to $10 million. Rationale: To support the operation and grant-giving programs of the Foundation.

Strategy 5b: Raise money according to the fundraising plan developed by the fundraising firm.

Objective 5c: By December 2000, establish and train a network of Foundation Representatives in each of the 108 Subordinate Boulés to coordinate Foundation activities on the Subordinate Boulé level. Rationale: To stimulate Archon involvement in and donations to the Foundation.

Strategy 5c: The Strategic Planning Committees of the Fraternity and the Foundation will jointly prepare and send to the Regional and Subordinate Boulé Sire Archons a description of the purpose, functions, and benefits of the network of Foundation Representatives. The Subordinate Boulé Sire Archons will be asked to identify one prospective Representative and submit his name to the Foundation Planning Committee. The Committee will, in turn, interview and orient the prospective Representative. The Representatives will then undergo a more inten-

Recommended Goals, Objectives, and Strategies *(Continued)*

sive training program, which will be developed by the fundraising consultant. An announcement about the network of Foundation Representatives will be made in *The Journal*, on the Website, in the Grand Sire Archon's newsletter, as well as in a special letter from the Chairman of the Boulé Foundation to all Archons.

Objective 5d: Enhance the existing culture of giving within the Boulé to support the Foundation. Rationale: To foster further internal giving by Archons to the Foundation.

Strategy 5d: The Foundation Trustee Board will institute donor recognition and incentive programs to reward Archons who give to the Foundation. Donors will be listed in *The Journal* and on the Web site. Donors will receive a special letter of thanks from the Chairman of the Foundation and special recognition at Boulé affairs.

Objective 5e: Increase awareness of the Boulé Foundation, by December 2001. Rationale: To facilitate the fundraising efforts and promote Foundation to outside funding sources as well as to Fraternity members and Archousai.

Strategy 5e: The Foundation Planning Committee will develop and disseminate to all Archons and corporate and other donors a Foundation semi-annual newsletter and an annual brochure. A regular column will be established in *The Boulé Journal* and on the Boulé's Web site.

GOAL 6: INCREASE THE ADMINISTRATIVE CAPACITY OF THE NATIONAL BOULÉ OFFICE.

Objective 6a: By August 2000, expand personnel capacity to assist Grand Grammateus in managing office and committee activities; in directing, troubleshooting, and monitoring implementation of the strategic plan; and in interfacing between the Fraternity and Foundation activities. Rationale: To ensure that full-time attention is given to implementing the strategic plan and other essential administrative tasks.

Strategy 6a: The Executive Committee will authorize the Grand Grammateus to create an assistant position to increase efficiency.

Recommended Goals, Objectives, and Strategies *(Continued)*

Objective 6b: Reorganize and update Central Office database of member information and determine information technology capabilities of Subordinate Boulés by August 2000. Rationale: To update information presently on database files and to expand member profile data.

Strategy 6b: Grand Grammateus will review current database and direct Central Office staff to work with Subordinate Boulés to update member information files.

Objective 6c: Begin accepting tasteful ads in *The Journal* by December 2000. Rationale: To finance the expansion of pages for reporting Fraternity and Foundation activities, announcements and other information in The Journal and to support the production of *The Boulé Newsletter*.

Strategy 6c: Retain the services of an advertising firm to assist the Grand Grapter in selling ad space to advertisers and creating the ads.

Objective 6d: Promote greater use of the *Boulé's Website* by Archons. Rationale: To facilitate improved information dissemination from Grand Boulé to Regional and Subordinate levels of the Fraternity.

Strategy 6d: Webmaster will develop a simple manual to provide training to Archons on how to access and use the *Boulé's Website*. The Webmaster will also improve user-friendliness of the site, which will include ensuring that Archons can easily access the Chat Room and other secured (nonpublic) pages.

Appendix

Highlights of the 1999 Boulé Member Survey

Survey Administration

A total of 3,536 survey questionnaires were mailed to Archons during the first week of May. By the end of July, 35.4% were completed and returned. The rates of survey returns for the five Regions were: Western (38.2%), Northeastern (36.0%), Pacific (35.8%), Central (32.9%) and Southeastern (32.7%).

Demographics of Survey Respondents

- Median age of 61.9 years; only 4% were below the age of 42.
- 98.5% are or were married.
- Highly educated: 100% bachelor's degree; 43% master's; 17% Ph.D.; 15% J.D.; 7% DDS or D.M.D.; and 18% MD.
- Professional occupations included: 20% corporate executives; 19% physicians; 11% professors/teachers; 9% school administrators; 9% lawyers; 6% dentists; 3% business owners; 2% judges; and 2% bankers.
- Average annual personal income was $150,000 and ranged from less than $50,000 to more than $500,000.
- 4 out of 10 Archons were semi-retired or retired.

Fraternity Participation

- The average length of membership in the Boulé was 10.1 years.
- Since joining the Boulé, the survey respondents had attended a median average of 8 Subordinate meetings, but only a median average of 2 Grand Boulé and 2 Regional meetings.
- 8 out of 10 have participated on at least one committee.

Evaluation of Boulé

- Most Archons favored how the Fraternity is organized; but more so on the subordinate and regional levels; many were unaware of the activities and policies on the national level.

Appendix *(Continued)*

- A majority (55%-60%) rated Executive and Social Action Committees as highly effective. But large percentages (40% and higher) were not aware of what all of the committees do.

Demand for Information

- 76% desire more information about activities and policies on the Grand Boulé level. Members prefer information via the *Journal* and *Newsletter*.

Views on Membership Expansion and Recruitment

- 95% of the Archons agreed that the membership should be expanded.
- 75% agreed that both younger and older members should be sought, but many said that younger members are needed to keep the organization thriving and adapting to changing times.
- Younger members can be attracted by offering them positions of responsibility and getting the Fraternity to be more socially active in the black community.
- Providing fellowship and networking opportunities would also attract the younger black men of today.
- 56% of the Archons said that mentoring for new members is not provided on a consistent basis and should be; also the Grand Boulé should develop standardized procedures for recruitment and mentoring.

Community Outreach

- Two-thirds said the Boulé should publicize itself more to the community; 22% were opposed.
- 72% said the Fraternity should collaborate with other organizations in making joint nonpartisan statements about social policies affecting the black community; 69% said the Fraternity should provide technical assistance to community programs; and 40% said that the Boulé should give money to community organizations.

Recommendations for the Grand Boulé Five-Year Plan

- Continue with opportunities to get to know the best of one another.
- Execute a public policy agenda for improving black communities.

Appendix *(Continued)*

- Attract new and younger members.
- Provide financial and technical assistance support for social action programs.
- Participate in interorganizational collaborations.
- Boulé Foundation should continue to offer scholarships and grants to community organizations, as well as collaborate with other foundations.

Visions of the Boulé in the 21st Century

- Become a larger and younger organization.
- Take a bolder stance on public policies affecting Blacks.
- Be more visible to the community.
- Act as a nonpartisan public policy think tank and advocate for black Americans.
- Be more involved in community programming concerning economic development and education.
- Continue as a refuge for educated black men to fellowship with one another.

Sigma Pi Phi Fraternity